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## Chapter 18 – Consultant Project Creation

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## Project

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Consultants have access to assigned projects only. The Consultant User role has the ability to add or edit project items and some basic project information. If the Design Consultant will also assign project funding, the Funding User role must also be assigned and consultants can see chapter 4 for guidance on setting up project funding. This chapter covers project items.

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### General Project Information

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1. Log into AWP and make sure the **Consultant User** role is selected (see chapter 1).  
(Figure 18.1)
2. (A) In the Project Overview component, search for your project.  
NOTES:
  - A minimum of a three (3) character string is required for the system to search. You can search by Project ID (State/IRIS number) or the Project Name.
  - You can also place the cursor in the project overview component search field and hit **<Enter>** for all projects assigned to your consultant company to appear.
3. (B) Click the **Project ID** link to open the project.

The screenshot displays the 'Project Overview' section of a software interface. At the top, there is a blue header bar with a dropdown menu labeled 'Project Overview', a 'Save' button, and a help icon. Below the header, there is a search bar containing the text '440'. An orange arrow labeled 'A' points to the search bar. To the right of the search bar is a 'System Default' dropdown and the text 'Showing 1 of 1'. Below the search bar, there is a table with three columns: 'Project', 'Type', and 'Name'. The first row of the table shows the project ID 'NFHWY00440' under the 'Project' column, '01 - Highways' under the 'Type' column, and 'Elliott Highway MP 0 - 12 Rehabilitation' under the 'Name' column. An orange arrow labeled 'B' points to the project ID 'NFHWY00440'. In the top right corner of the table area, it says '0 changed'.

Figure 18.1

The Project Summary component will appear (*Figure 18.2*). The Project Summary component contains some read-only information at the top that cannot be edited by Consultant Users. Beneath that is a Financial Info container and an ADA Info container with fields that can be edited as necessary.

1. (A) If applicable, in the **Original Lane Miles** field, enter the number of lane miles on the project before construction.
2. (B) In the **Initial CENG % from Design** field, enter in the percentage at which CENG will be applied to the project.
3. (C) The **ICAP %** field will default to the current ICAP rate for highway projects. If a different ICAP rate applies to your project, enter it here.  
NOTE: The **Project Item Total** field is a read-only field that will autocalculate as items are added to the project. This amount does not include CENG or ICAP.
4. (D) Add information in the fields within the ADA Info container if applicable. Hover over the field labels and tool tips will provide information on the data that should be entered.
5. (E) Click **<Save>**.

**Project Summary**

▼ Project: NFWY00144 - Dalton Hwy MP 209-222 Reconstruction

Proposal: NFWY00144

**General**

Project ID: NFWY00144

Federal Project Number: 0655015

Project Name: Dalton Hwy MP 209-222 Reconstruction

Spec Book: HWY2017 - Highway 2017

Project Type: 01 - Highways

Location:

**Description of Work**

Reconstruct the Dalton Highway between MP 209-222 including widening, spot repairs, and realignment.

**Original Lane Miles**  (A)

**Post-Construction Lane Miles**

**Financial Info**

**Initial CENG % from Design**  (B)

**ICAP %**  (C)

**Project Item Total**

**ADA Info**

**Islands on Project**

**Public Facilities Access Points on Project**

**Curb Ramps on Project**  (D)

**ADA Comments**

**Save** (E)

Figure 18.2

## Categories

Categories are used to group items as required by the type and complexity of the project. Category choices are: Basic Bid, Additive Alternate, or NTP.

To add a category:

1. On the top of the Project Summary component, select the **Categories and Items** quick link to add, edit, or delete categories (*Figure 18.3*).



Figure 18.3

The Project Category and Item Summary component will appear (*Figure 18.4*).

2. (A) Select the **Categories** tab.
3. (B) Click the **<New>** button.
4. From the **Category ID** dropdown, select the appropriate category.
5. **Combine Like Categories:** This applies to projects that will be advertised with one or more additional projects. This function allows multiple categories with the same Category ID (and the associated pay items) to combine into one category at the Proposal level. For example, if a Proposal has two Projects on it and the Basic Bid categories for both projects have the Combine Like Categories boxes checked, the items from both Basic Bid categories will combine to make one section on the bid schedule. If a Proposal has two Projects, each with its own Basic Bid category, but the Combine Like Items boxes are not checked, then the items appear in separate Basic Bid sections on the bid schedule. If a Proposal has only one Project on it, the Combine Like Categories box becomes a non-issue as there will never be two identical categories on the same project.
6. Click **<Save>**.
7. Repeat steps 3 – 6 to add additional categories.

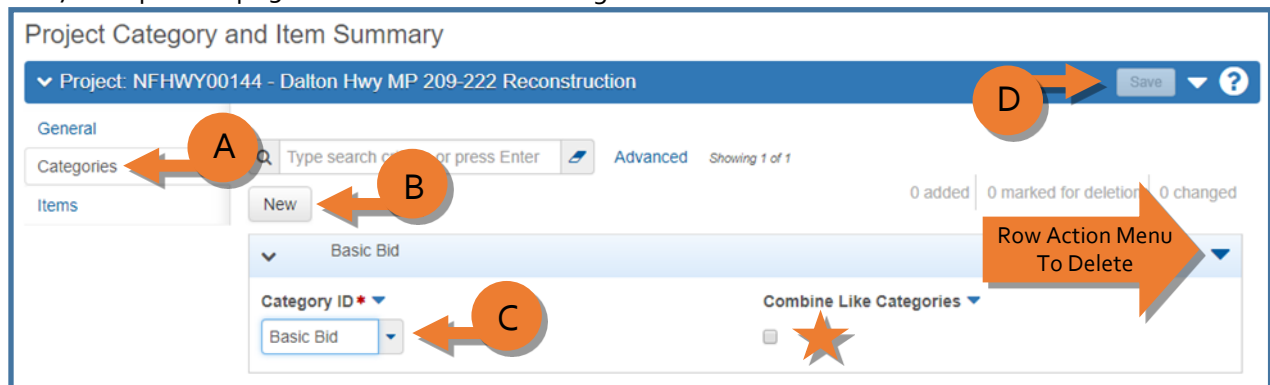



Figure 18.4

If a Category ID needs to be changed, it is not necessary to delete the existing category and create a new one. Simply reselect the Category ID and click **<Save>**.

To delete a category:

8. Expand the **row actions menu** on the right side of the category record and select **Delete** (see *Figure 18.4*). The category is marked for deletion and users may “undo”  the action until the user clicks **<Save>**.

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## Items

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Items are added to the project and associated to a category. There are two ways to add items to the project. The Item Worksheet and the Items tab. The Item Worksheet is the primary way most users will add items to the project. It is a grid that appears similar to an excel spreadsheet and is an easy way to add or edit basic item information. The Items tab allows users to add items one at a time, but also contains more information about the item. Most users will add items by Item Worksheet and add extra information in the Items area. Reminder: Save often when adding items to your project.

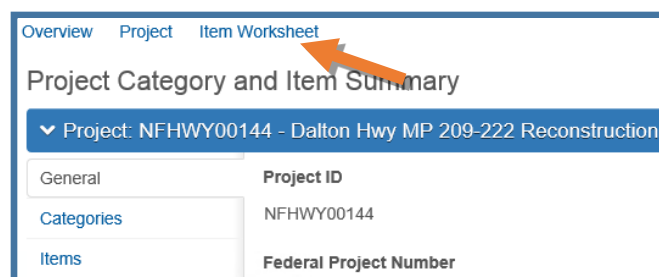
To find historical bid information to create estimates, you will use Bid Tab and the Find Bid Data function of AWP. To look up bid data in the Find Bid Data component, see the next section.

Note about Furnished Material items: There are two types of furnished material items. The first type are those that are for the installation or placement of furnished material and appear on the bid schedule for contractors to bid on the amount of the installation or placement. These will have “placement” or “installation” in the item name. The second type are those that are what the Department or furnishing agency (i.e. Railroad) paid for the material for the contractor to then install or place and do not appear on the bid schedule for contractors to bid on and do not have CENG applied. If you have furnished material on your project, coordinate with your design manager and a module administrator for assistance if needed.

NOTE: If the item you need does not appear in the list, contact a Module Administrator to add it to the system.

### Adding Items by Item Worksheet

1. Navigate to the Project Summary component from the Project Overview on the Dashboard.
2. Select the **Categories and Items** quick link at the top of the Project Summary component screen (see *Figure 18.3*).
3. Select the **Item Worksheet** quick link at the top of the Project Category and Item component screen (*Figure 18.5*).



*Figure 18.5*

The Item Worksheet grid consists of eleven columns:

**Category:** The category created earlier to which the item belongs.

**Line Number:** A sequential number assigned to the item by the system.

**Item:** The standard or regional special pay item number.

**Description:** The description associated with the item number.

**Supp Descr Instructions:** Instructions as to what information is required in the Bid Sched Supp Descr field for this item.

**Bid Sched Supp Description:** An additional description for the item, sometimes a required field if the item description needs a specific piece of information added (such as pipe gauge). This supplemental description will appear on the bid schedule.

**Roll Up Supp Description:** To use when there are multiples of the same pay item that will be rolled up into one item on the bid schedule (roll up items must have the same unit price). This supplemental description will not appear on the bid schedule and is a means of distinguishing the multiples for design, funding assignment, and construction administration purposes. This field is used in conjunction with the Combine Like Items field.

**Combine Like Items:** This field should only be changed to yes (checked box) for multiples of the same pay item that will be rolled up into one item on the bid schedule. Combining like items allows for the design, funding assignment, and construction administration of multiples of the same pay item while allowing the contractor to bid on one item. This field is used in conjunction with the Roll Up Supp Description field.

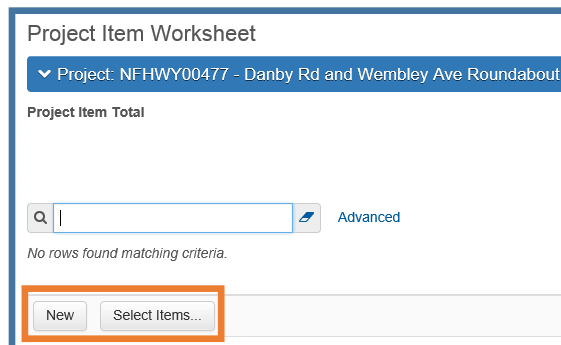
**Unit:** The unit of measure by which the quantity was estimated.

**Quantity:** The estimated number of units of the item.

**Price:** The estimated unit price of the item.

**Ext Amt:** The extended amount is the product of the quantity and the unit price.

You can add items to your worksheet two ways, the Select Items button or the New button (*Figure 18.6*). The **<Select Items>** button allows you to add one item or add multiple items to your item worksheet at once. The **<New>** button allows you to add one item to your item worksheet at a time. Note: When searching items using the New button, the unit of measure for the item is not displayed.



*Figure 18.6*

Select Items button (*Figure 18.7*):

4. Click the **<Select Items>** button (See *Figure 18.6*).
5. (A) In the auto-complete item field, type at least 3 characters of the item number or description. Any item containing that string of 3 characters will appear.
6. (B) Select the item(s) you want to add, a green checkmark will appear next to the selected item. The number of items you have selected in total will appear in the upper right.
7. (C) You can search for and select multiple items before clicking the **<Add to Project>** button on the lower right of the screen.

The screenshot shows a 'Select Items' window with a search bar at the top. Below the search bar is a table with columns for Item, Description, and Unit. Two items are selected, indicated by green checkmarks in the Item column. The '2 selected' status is shown in the top right corner. The 'Add to Project' button is at the bottom right.

Item	Description	Unit
203.0001.0000	Common Excavation	CY - Cubic Yard
203.0002.0000	Rock Excavation	CY - Cubic Yard
✓ 203.0003.0000	Unclassified Excavation	CY - Cubic Yard
203.0004.0000	Muck Excavation	CY - Cubic Yard
203.0005.0000	Borrow	CY - Cubic Yard
✓ 203.0006.0000	Borrow	TON - Ton
203.0007.0000	Borrow	CYVM - Cubic Yard Vehicle Meas
203.0008.0000	Stripping State-Furnished Material Sources	CY - Cubic Yard
203.0009.0000	Obliteration of Roadway	SY - Square Yard
203.0010.0000	Controlled Blasting	LF - Linear Foot
203.0011.0000	Ditchline/Subgrade Blasting	SY - Square Yard
203.0012.0000	Drain Holes	LF - Linear Foot
203.0013.0000	Stabilization - Dark Belt	SY - Square Yard

*Figure 18.7*



The items you selected will appear in the Item Worksheet grid (Figure 18.8).

Project Item Worksheet

> Project: NFHWY00300 - Chicken Airport Access Road Resurfacing

Project Item Total

Q Type search criteria or press Enter Advanced There are unsaved changes.

Cat ID	Line Num	Item	Description	Supp Desc Instructions	Bid Sched Supp Desc	Roll Up Supp Desc	Combine	Units	Quantity	Price	Ext Amt
		201.0001.0000	Clearing				No	ACRE		0.00	
		203.0006.0000	Borrow				No	TON		0.00	
		301.0001.0001	Aggregate Base Course, Gra...				No	TON		0.00	
		303.0001.0000	Reconditioning				No	STA		0.00	
		603.0001.0024	CSP 24 inch				No	LF		0.00	
		602.0002.0000	Structural Plate Pipe Arch. ___ Span ___ Rise ___ Gauge				No	LF		0.00	
		613.0002.0000	Culvert Marker Post				No	EACH		0.00	
		618.0001.0000	Seeding				No	ACRE		0.00	
		642.0001.0000	Construction Surveying				No	LS	1.000	0.00	0.00
		644.0001.0000	Field Office				No	LS	1.000	0.00	0.00
		643.0002.0000	Traffic Maintenance				No	LS	1.000	0.00	0.00
		640.0001.0000	Mobilization and Demobilization				No	LS	1.000	0.00	0.00

New Select Items...

Figure 18.8

8. (D) Click <Save>.

NOTES:

- Lump sum item quantity fields will autopopulate with a quantity of 1.0. However, a warning message will appear regarding lump sum items needing to be between 0 and 1. You can ignore those warnings and close the warning box (Figure 18.9).
- Contingent sum item unit price fields will autopopulate with a unit price of \$1.00. For contingent sum items, put the total dollar amount in the quantity field. This allows Construction to enter the amount to be paid to the contractor in the quantity field and allows flexibility to pay to the penny, which wouldn't be possible otherwise. If you have zero quantity contingent sum items, ignore any warnings in the yellow bar related to these items.

Save Complete

Warning: Detected 6 rows with warnings. Please review messages below.

The Quantity for a Lump Sum Project Item must be greater than 0 and less than or equal to 1.0. The Quantity has been reset to 1.0 for item '644.0001.0000'.

The Quantity for a Lump Sum Project Item must be greater than 0 and less than or equal to 1.0. The Quantity has been reset to 1.0 for item '644.0006.0000'.

The Quantity for a Lump Sum Project Item must be greater than 0 and less than or equal to 1.0. The Quantity has been reset to 1.0 for item '646.0001.0000'.

The Quantity for a Lump Sum Project Item must be greater than 0 and less than or equal to 1.0. The Quantity has been reset to 1.0 for item '670.0001.0000'.

The Quantity for a Lump Sum Project Item must be greater than 0 and less than or equal to 1.0. The Quantity has been reset to 1.0 for item '642.0001.0000'.

The Quantity for a Lump Sum Project Item must be greater than 0 and less than or equal to 1.0. The Quantity has been reset to 1.0 for item '643.0002.0000'.

Show All Show Warnings

Figure 18.9

Enter in the remaining item information into your worksheet (Figure 18.10).

9. (A) Double click the **Category ID** field. Search for and select the appropriate category for the item.

NOTES:

- Rather than double-click each field in the item worksheet, you can <Tab> into the next field, hit <Enter> to open the field, enter your value, and <Tab> to the next field.
- If all your items belong to the same category, use the Range Fill option to populate the remaining category fields. Click the **blue down arrow** next to the CatID label check to fill all Rows and click <Fill> (see Figure 18.10 inset).

10. (B) Double click and enter a **Bid Schedule Supplemental Description** if necessary or required (project items with a Bid Schedule Supp Description cannot roll up).
  - a. Double click and enter a **Roll Up Supplemental Description** if there are multiples of the same pay item that will be rolled up into one item for bidding. This field does not appear on the bid schedule. Note: Must be used in conjunction with the Combine Like Items field
  - b. Double click and check the **Combine Like Items** field if there are multiples of the same pay item that will be rolled up into one item for bidding. Note: Must be used in conjunction with the Roll Up Supplemental Description field.

NOTE: At the project level, only ONE supplemental description type can be used. If a rolled up item also needs a bid schedule supplemental description, this can be added in Proposal once the project item has become a proposal item.

11. (C) Double click the **Quantity** field and enter the estimated quantity for the item, unless it is a lump sum item.
12. (D) Double click the **Price** field and enter the estimated unit price for the item, unless it is a contingent sum item.
13. (E) Click <Save>.

NOTE: the Extended Amount field will calculate once you save.

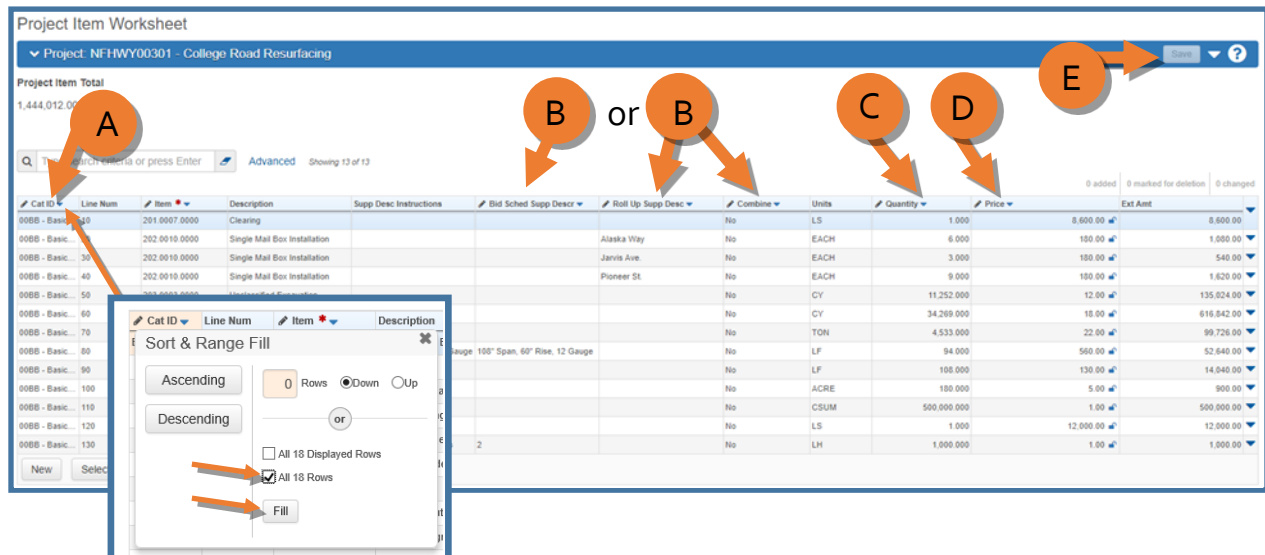


Figure 18.10

New button (*Figure 18.11*):

1. (A) Click the **<New>** button to create a blank new row.
2. (B) Double click the **Category ID** field. Search for and select the appropriate category for the item.
3. (C) Double click the **Item ID** auto-complete field. Type at least 3 characters of the item number or description. Any item containing that string of 3 characters will appear. Select the item you want to add.
4. (G) Click **<Save>**.

NOTES:

- Lump sum item quantity fields will autopopulate with a quantity of 1.0. However, a warning message will appear regarding lump sum items needing to be between 0 and 1. You can ignore those warnings and close the warning box (see *Figure 18.9*).
  - Contingent sum item unit price fields will autopopulate with a unit price of \$1.00. For contingent sum items, put the total dollar amount in the quantity field. This allows Construction to enter the amount to be paid to the contractor in the quantity field and allows flexibility to pay to the penny, which wouldn't be possible otherwise. If you have zero quantity contingent sum items, ignore any warnings in the yellow bar related to these items.
5. (D) Double click and enter a **Bid Schedule Supplemental Description** if necessary or required (project items with a Bid Schedule Supp Description cannot roll up).
    - a. Double click and enter a **Roll Up Supplemental Description** if there are multiples of the same pay item that will be rolled up into one item for bidding. This field does not appear on the bid schedule. Note: Must be used in conjunction with the Combine Like Items field
    - b. Double click and check the **Combine Like Items** field if there are multiples of the same pay item that will be rolled up into one item for bidding. Note: Must be used in conjunction with the Roll Up Supplemental Description field.

NOTE: At the project level, only ONE supplemental description type can be used. If a rolled up item also needs a bid schedule supplemental description, this can be added in Proposal once the project item has become a proposal item.

6. (E) Double click the **Quantity** field and enter the estimated quantity for the item, unless it is a lump sum item.
7. (F) Double click the **Price** field and enter the estimated unit price for the item, unless it is a contingent sum item.
8. (G) Click **<Save>**.

NOTE: the Extended Amount field will calculate once you hit **<Save>**.

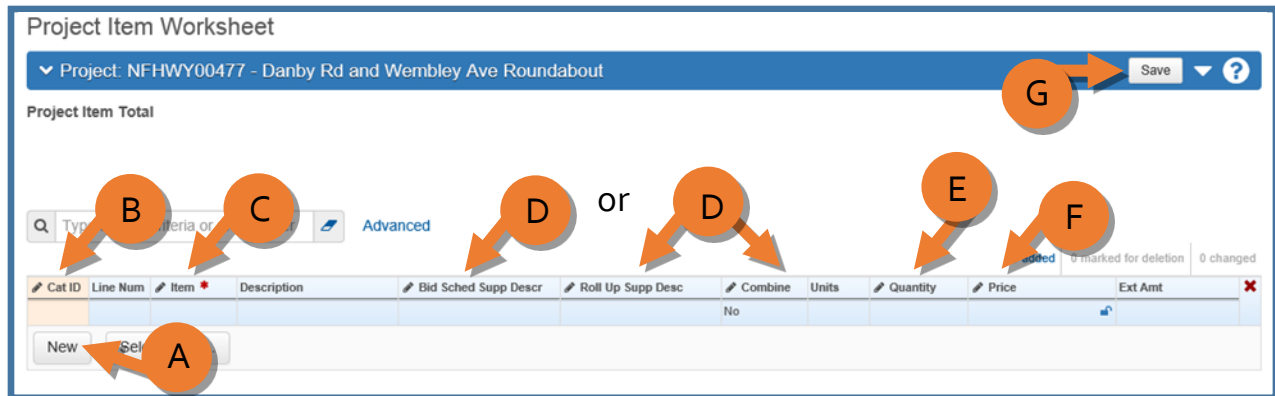



Figure 18.11

Item Worksheet Action Menu options (Figure 18.12):

Open the **row action menu** on the far right side of the item row.

1. To copy and paste an Item Worksheet row, click the **Copy icon** to copy the selected row. Open the **action menu** again and click the **Paste Below icon** to paste the copied row below.
2. To insert a blank new row above, click the **Insert New Row icon**. Populate the row by following the **New** button steps in the previous section.
3. To delete a worksheet item row, open the **action menu** and click the **Delete icon**. The item record is marked for deletion and users may "undo"  the action until the user clicks **<Save>**.

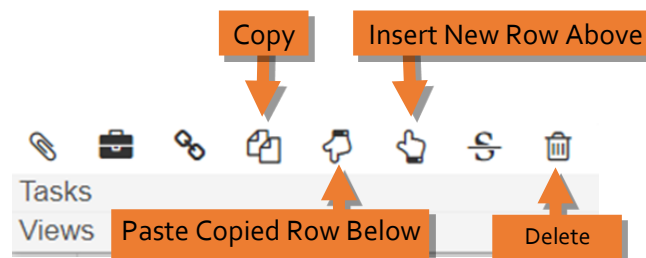


Figure 18.12

Item Worksheet extra tips/notes:

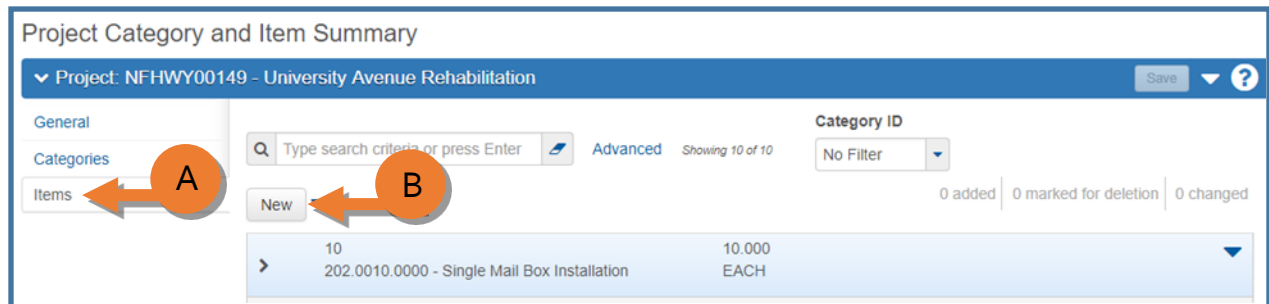
1. If after creating your initial items on your worksheet, you add an item that appears at the bottom of the list and is out of order, click **<Save>** and the items will reorder by item number.
2. As you build your worksheet, the **Project Item Total** above the worksheet will populate. This amount does not include CENG or ICAP.

#### Editing Items in the Item Worksheet:

1. Navigate to the Project Summary component from the Project Overview on the Dashboard.
2. Select the **Categories and Items** quick link at the top of the Project Summary component screen (see *Figure 18.3*).
3. Select the **Item Worksheet** quick link at the top of the Project Category and Item component screen (*Figure 18.5*).
4. Add, edit, delete any information necessary and click **<Save>**.

#### Adding Items in the Items tab:

1. Navigate to the Project Summary component from the Project Overview on the Dashboard.
2. Select the **Categories and Items** quick link at the top of the Project Summary component screen (see *Figure 18.3*).
3. (A) Select the **Items** tab (*Figure 18.13*).
4. (B) Click the **<New>** button.



*Figure 18.13*

5. At the bottom of the component window, a New Project Item record will appear at the bottom of the item list (*Figure 18.14*). Refer to the Item Fields table at the end of this chapter for guidance on how to fill in the data fields. Required fields include Item ID, Quantity, Project Item Unit Price, Category ID and possibly the Bid Schedule Supplemental Description.

**New Project Item**

Item ID ▼

Unit of Measure

Quantity ▼

Project Item Unit Price ▼

Extended Amount

Category ID ▼

Proposal Item Line Number ▼

Comments ▼

**Fill only ONE Supplemental Description**

Bid Schedule Supplemental Description ▼

Roll Up Supplemental Description ▼

Combine With Like Items ▼

☐

Supplemental Description Required

**Alternate Calculation for Lump Sum**

Alternate Quantity ▼

Alternate Unit Price ▼

Alternate Unit of Measure ▼


Last Updated By

Last Updated Date

Figure 18.14

6. To add another item, click **<New>** and repeat.  
NOTE: All item information can be edited and resaved.

To delete an item in the item tab (Figure 18.15):

- a. (A) Expand the **row actions menu** on the right side of the item record and (B) select **Delete**. The item record is marked for deletion and users may “undo”  the action until the user clicks **<Save>**.

**Project Category and Item Summary**

Project: NFHWY00303 - Mitchell Expressway Rehabilitation

Category ID

No Filter

0 added | 0 marked for deletion | 0 changed

Item ID	Description	Quantity	Unit	Actions
10	401.0001.002B - HMA, Type II, Class B	5,200.000	TON	
20		420.000		Delete

Figure 18.15

### Editing Items in the Items tab:

1. Navigate to the Project Summary component from the Project Overview on the Dashboard.
2. Select the **Categories and Items** quick link at the top of the Project Summary component screen (see *Figure 18.3*).
3. Select the **Items** tab (*Figure 18.16*).
4. Click the **Expand/Collapse arrow** for an item.
5. Modify item information as necessary.
6. Click **<Save>**.

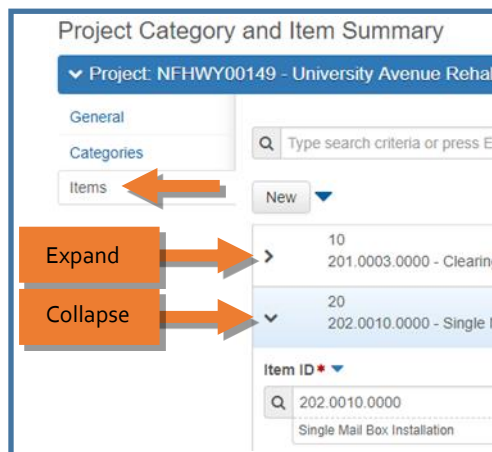


Figure 18.16

## Find Bid Data

To look up historical bid data for projects that have been created in AWP, there is a Find Bid Data component on the dashboard for the Project User role (*Figure 18.17*).

(A) There are multiple ways to search for items:

1. In the auto-complete item field, type at least 3 characters of the item number, item description (name), or the name of the proposal. Any proposal with an item containing that string of 3 characters will appear. For example, if you are looking for projects with Unclassified Excavation, you can type in Exc or Unc in the field.
2. In the Bid Item field, enter 3 characters of the item number or item description.
3. From the Filter dropdown, select Advanced and build a filter to narrow down the list. For example, you may want to look up bid prices for an item in one region only.
4. Use a combination of the first three to really narrow down search results (*Figure 18.18*). See the Search, Sort and Filter section of chapter 2 for more information on building filters.

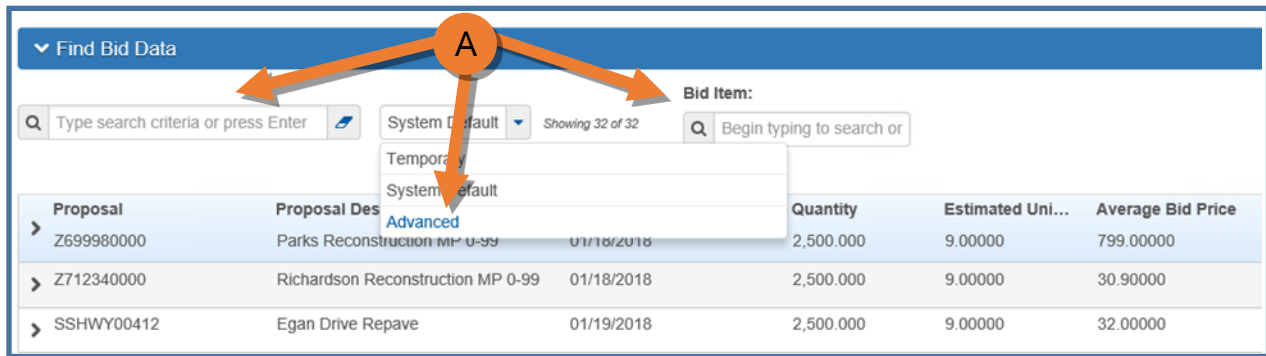


Figure 18.17

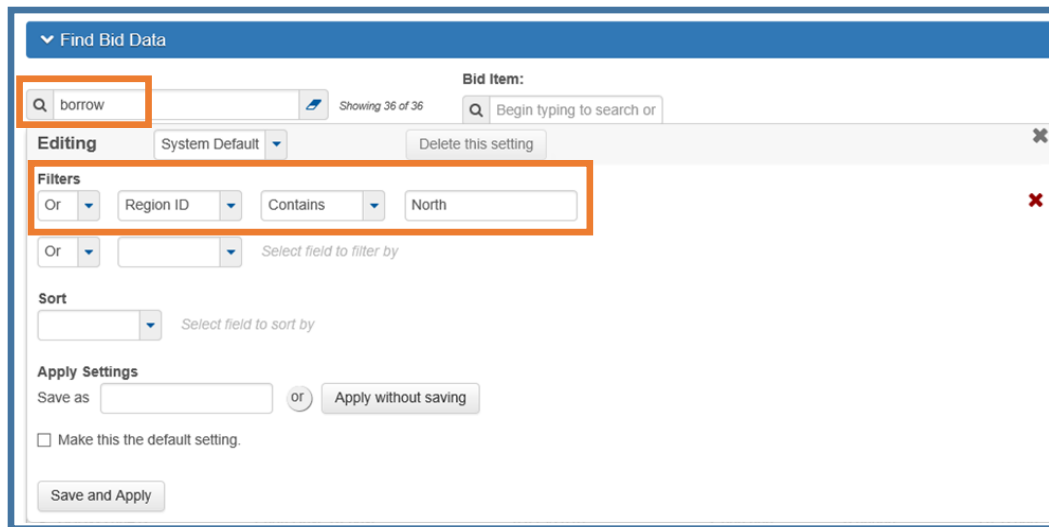


Figure 18.18

Once you have filtered to get your list, the average bid price for all bidders for that item on that proposal will appear (Figure 18.19). Click the expand arrow to view more information about the individual bids on that item.

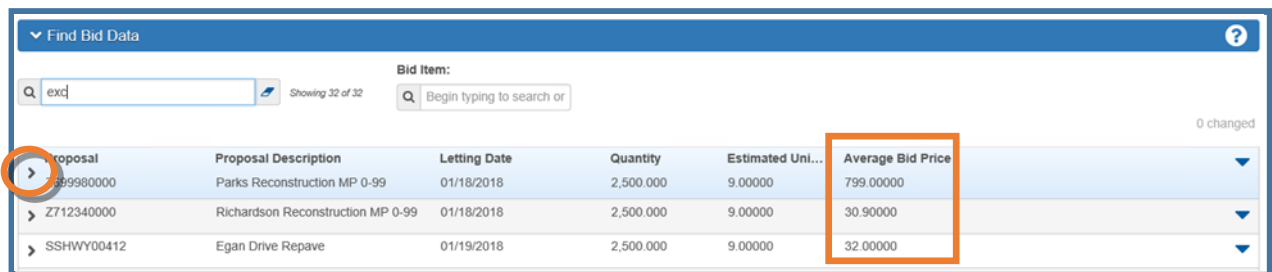


Figure 18.19



## Project Level Reports

Generating the Project level Engineer's Estimate PDF report:

1. From the Project Overview component on the dashboard, search for and select your project. The Project Summary component will appear (*Figure 18.20*).
2. (A) Expand the Project Summary component **action menu** on the right side of the header.
3. (B) Select **Project Engineer's Estimate**.

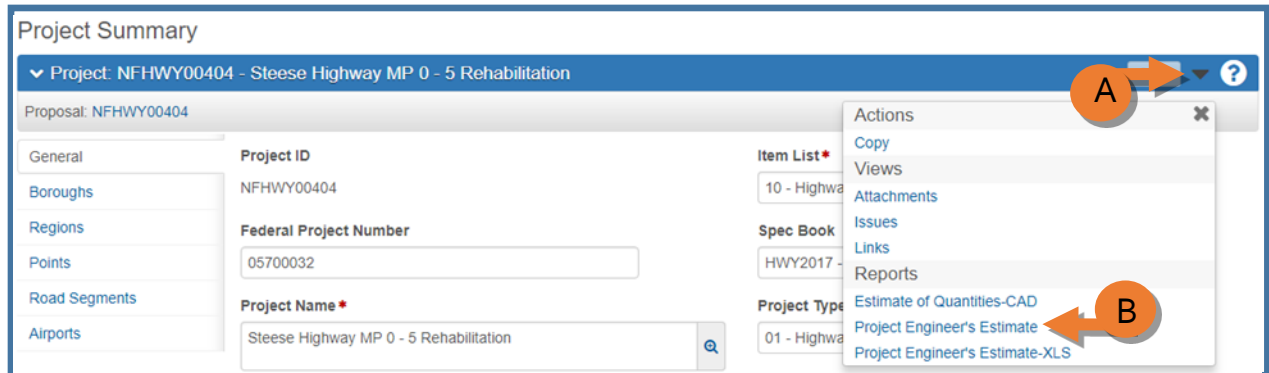


Figure 18.20

The Generate Report component will appear (*Figure 18.21*).

4. (C) In the **Estimate Description** field, enter the type of Engineer's Estimate.
5. (D) Uncheck the **Show Cost Estimate** report box.
6. (E) Click <Execute>.

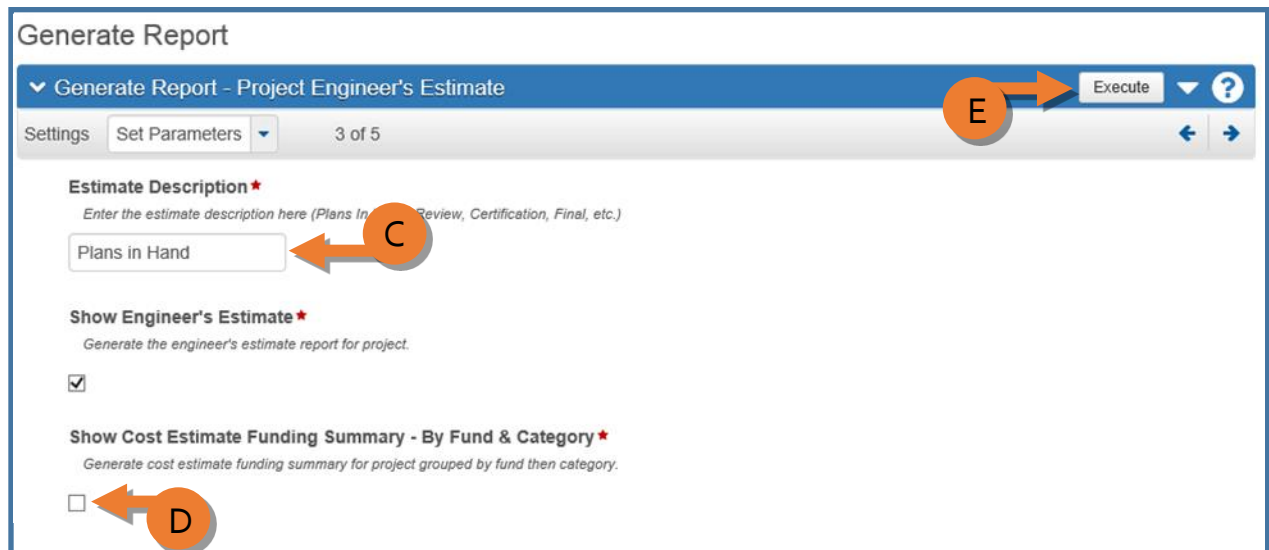


Figure 18.21

Generating the Project level Engineer's Estimate excel spreadsheet or the Estimate of Quantities excel that is formatted for CAD:

1. From the Project Overview component on the dashboard, search for and select your project. The Project Summary component will appear (*Figure 18.22*).
2. (A) Expand the Project Summary component **action menu** on the right side of the header.
3. (B) Select **Project Engineer's Estimate-XLS** or **Estimate of Quantities-CAD**.

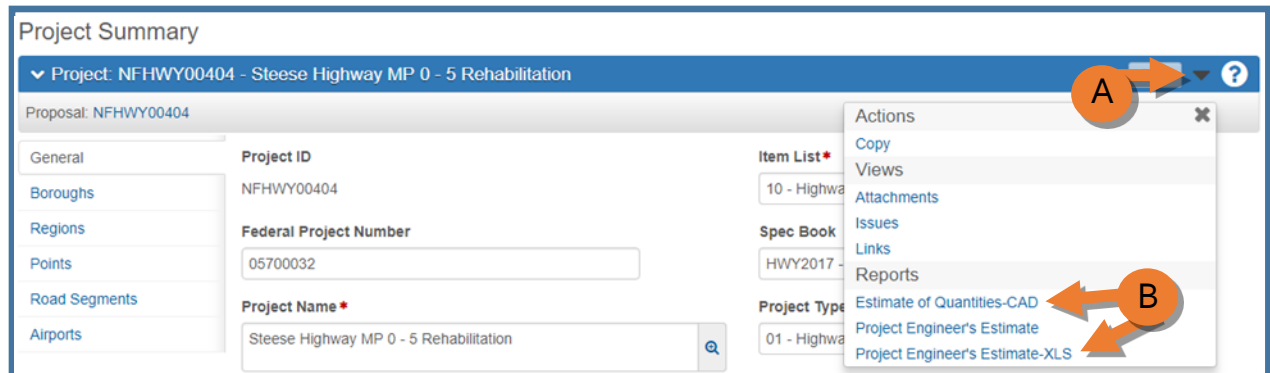


Figure 18.22

The Generate Report component will appear (*Figure 18.23*).

4. (C) Click <Execute>.

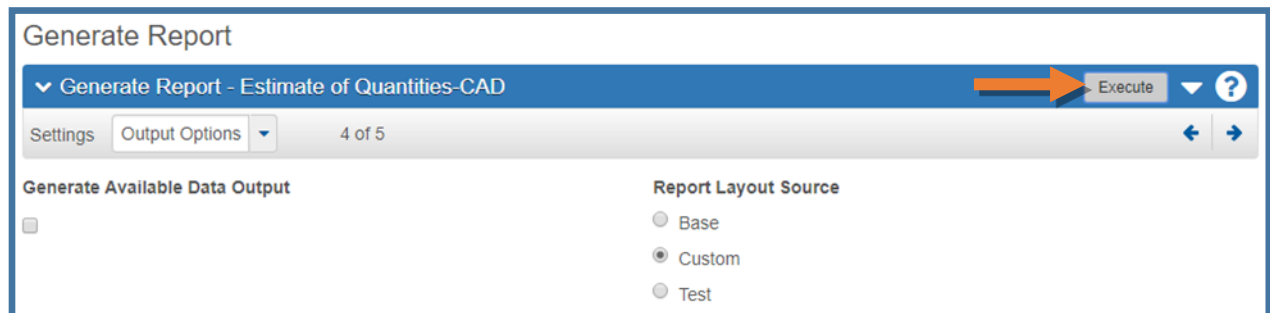


Figure 18.23